Educational Briefing

Project Officer - Unit Project Officer - Keyperson

Training Agenda

- CFC history
- Organization
- Regulations
- CFC focus
- Responsibilities
- Campaign FUNdraisers
- Potential
- Materials
- Impact
- Frequently asked questions

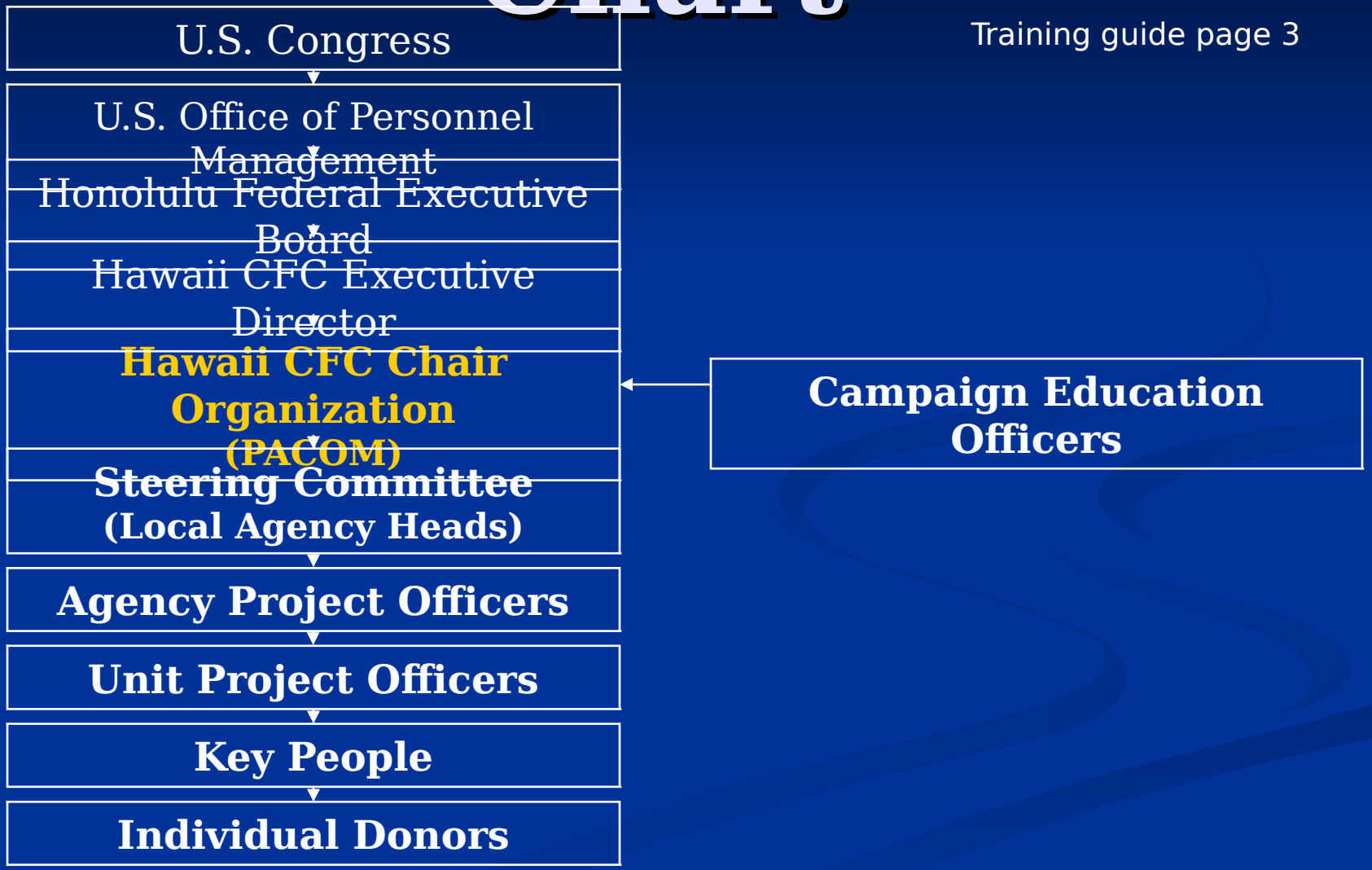
General Information

Training guide page 1

- CFC history
  - Established in 1961 by John F. Kennedy
  - Campaign occurs once a year
    - September 1 – December 15
    - 2005 Hawaii CFC
      - September 19 – October 28
  - About 400 Combined Federal Campaigns
  - Hawaii-Pacific Area CFC is 4th in size
  - Over 250 million dollars raised nationally

Organizational Chart

Training guide page 3



Local Information

Training guide page 1

- **History of Giving in Hawaii**
  - **Number of federal employees**
  - **Average gift has increased**
  - **Use of payroll deduction is the preferred**

YEAR	POP	TOTAL ACHIEVED	%POT ACH'D	% PARTICIP	AVE GIFT	%USING PAYROLL
2000	69,125	$4,825,651	40%	55.77%	$125.18	72.41%
2001	70,517	$5,305,279	45%	55.80%	$134.83	73.04%
2002	70,004	$5,425,480	43%	55.00%	$141.63	72.00%
2003	72,778	$5,597,193	40%	53.00%	$146.02	71.00%
2004	60,422	$4,991,986	43%	51.20%	$161.30	70.23%

CFC Regulations

- **“The CFC is the only authorized solicitation of federal employees in the federal workplace on behalf of charitable organizations.”**
- **“The agency head of each federal agency will initiate campaigns within their offices or installations and provide support for the campaign…”**
- **“Employee solicitations shall be conducted during duty hours…”**

Campaign Focus

- Leadership involvement
  - Be actively involved
  - Demonstrate support
  - Needs to be visible
  - Recognize donors and units
  - Ensure FEAT concept

Campaign Focus

- **FEAT**
  - **Find**
  - **Educate**
  - **Ask**
  - **Thank**

Campaign Focus

- **FIND**
  - **Locate all units and offices**
  - **Create a contact list for each unit and office**
  - **Make sure list is complete so that all donors may be contacted**
  - **Turn completed list into Planning Committee**
  - **CEO will use the list as a checklist**

Campaign Focus

- **EDUCATE**
  - **CEO will conduct educational briefs**
- **Education Brief (includes the following)**
  - **Introduction of Keypeople and Project Officer**
  - **Leadership remarks**
  - **Show video/Charity Speaker**
  - **Answer questions**

Campaign Focus

- ASK
  - Keyperson's responsibility
  - Visit each federal employee
  - Present donor card and brochure
  - Answer questions
  - Ask for contribution
  - Thank everyone!

Campaign Focus

- THANK
  - Give recognition items to eagle and super eagle givers upon receipt of donation
  - Leadership thank you
  - Certificates of appreciation
  - Memos and Emails to employees
  - Verbally recognize and thank everyone

Campaign Focus

- **Individual Potential**
  - **One percent pay per month x 12 months (.01) (base pay)**
  - **Individual potentials are located in the brochure and pledge card (suggested giving guide)**
- **Campaign Potential**
  - **Combined Federal Agency payroll x (.01)**
  - **Focus on FEAT**
- **Recognition**
  - **Agencies, departments, units, and individuals are recognized based on potential**

Campaign Focus

- **Payroll deduction**
  - **Advantages**
    - **Easier to give**
    - **Allows donors to make a bigger difference**
    - **Does not start until January and continues through December (1 Year and automatically stops)**
  - **Explain advantages when cards are handed out!**

Campaign Focus

- **Special FUNdraising Events**
  - **Use to wrap up campaign**
  - **Bake sales and car washes**
  - **Increases unit potential achieved**
  - **Raises morale**
  - **Have fun!**
  - **Thank everyone!**

Campaign Roles

- Campaign Education Officer
- Agency Project Officer
- Unit Project Officer
- Keypeople
- Individual Donors

Campaign Education Officer

- **Responsibilities**
  - **Educate Project Officers, Keypeople, and Donors**
  - **Help with materials and recognition items**
  - **Review completed audit of envelopes and their contents with Unit Project Officers**
  - **Support federal agencies throughout entire campaign**

Agency Project Officer

Training guide page 4

- **Leadership**
  - **Overall responsible for agency's campaign**
  - **Reports to the Agency Head the status of the campaign**
  - **Lead Unit Project Officer in implementing the campaign strategy (FEAT)**
  - **Establish and track award recognition structure by unit or department**

Unit Project Officer

- **Essential Responsibilities** Training guide page 6
  - **Leadership**
    - **Ensure campaign gets visibility**
    - **Encourage fundraisers to wrap up your campaign**
    - **Discourage prohibited practices**
  - **Accountability**
    - **Materials**
      - **Contents of envelope**
      - **Recognition items**
    - **Progress reports (weekly)**
    - **Deposit slips**
      - **Ensure cash/check donations get deposited, validated and returned to corresponding envelope**
    - **Track Recognition Items by agency, unit, & department**
    - **Auditing**

Unit Project Officer

- **Action Steps** Training guide page 6
  - **Identify Keypeople (1 per 25 people)**
  - **Contact CEO for educational briefs for all employees**
    - **Plan time & location for briefs**
    - **Submit Speaker Request Form**
  - **Distribute Envelopes to Keypeople**
  - **Ensure everyone attends an educational brief**
  - **Receive completed envelope from Keypeople**
  - **Audit envelopes to ensure accuracy of pledge cards and keyperson reports**
    - **Refer to Training Guide**
  - **Contact CEO to turn in completed envelopes**

Keyperson

- **Responsibilities**

Training guide page 7

  - **Leadership**
  - **Ask**
    - **Distribute pledge cards and donor brochures after CEO educational brief**
    - **Retrieve pledge cards (ensure accuracy)**
    - **Be prepared to answer donor's questions**
  - **Encourage payroll deduction**
  - **Thank everyone!**
    - **Distribute Recognition items to Eagle and Super Eagle givers**
  - **Complete and sign keyperson report**

Keyperson

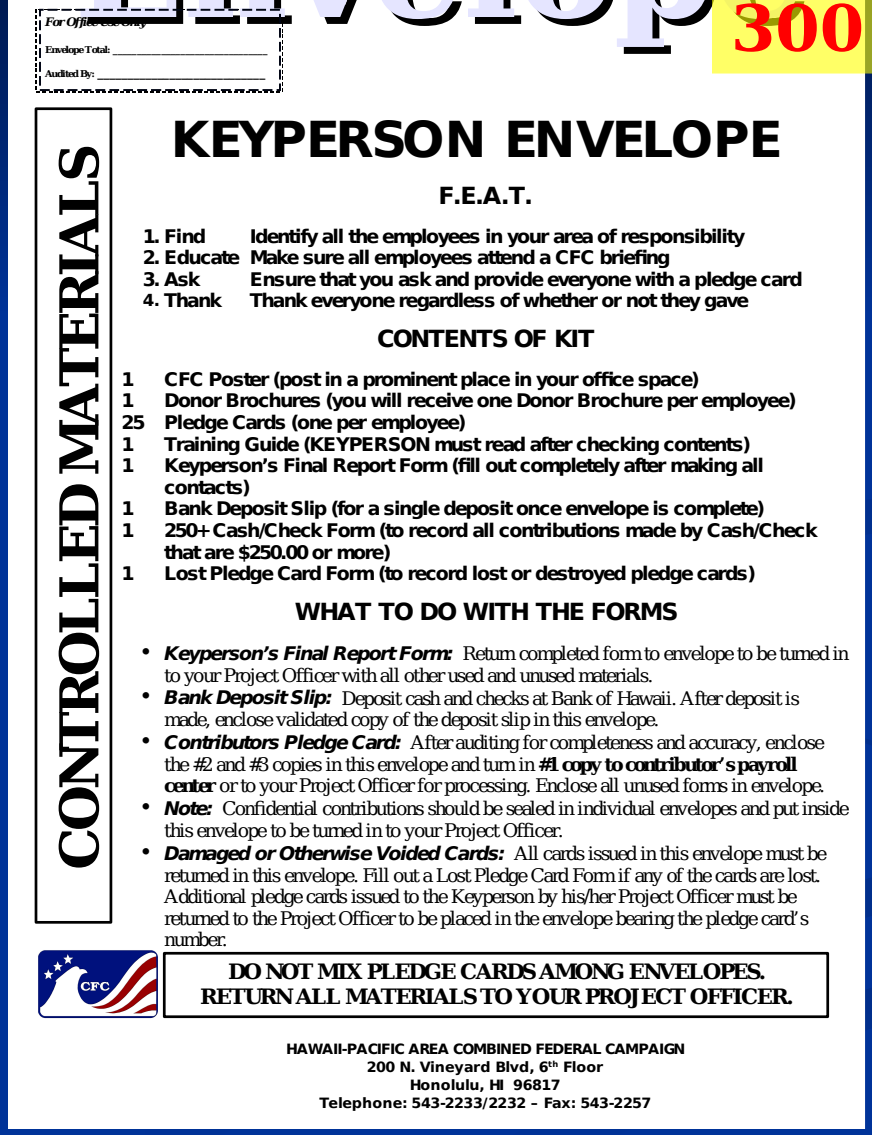
- **Responsibilities**

Training guide page 7

  - **Manage the contents of the envelope**
    - **25 pledge cards**
    - **1 keyperson final report**
    - **1 lost pledge card form**
    - **1 $250+ cash/check form**
    - **1 deposit slip**
      - **Must be validated by bank when deposits are made**
    - **1 training guide (CFC reference guide)**
    - **1 point of contact poster**
  - **Donor Brochures will be distributed based on federal agency population**

Keyperson's Envelope

3001 Keyperson Final Report #



For Office use only

Envelope Total: _____

Audited By: _____

CONTROLLED MATERIALS

KEYPERSON ENVELOPE

F.E.A.T.

1.	Find	Identify all the employees in your area of responsibility
2.	Educate	Make sure all employees attend a CFC briefing
3.	Ask	Ensure that you ask and provide everyone with a pledge card
4.	Thank	Thank everyone regardless of whether or not they gave

CONTENTS OF KIT

1	CFC Poster (post in a prominent place in your office space)
1	Donor Brochures (you will receive one Donor Brochure per employee)
25	Pledge Cards (one per employee)
1	Training Guide (KEYPERSON must read after checking contents)
1	Keyperson's Final Report Form (fill out completely after making all contacts)
1	Bank Deposit Slip (for a single deposit once envelope is complete)
1	250+ Cash/Check Form (to record all contributions made by Cash/Check that are $250.00 or more)
1	Lost Pledge Card Form (to record lost or destroyed pledge cards)

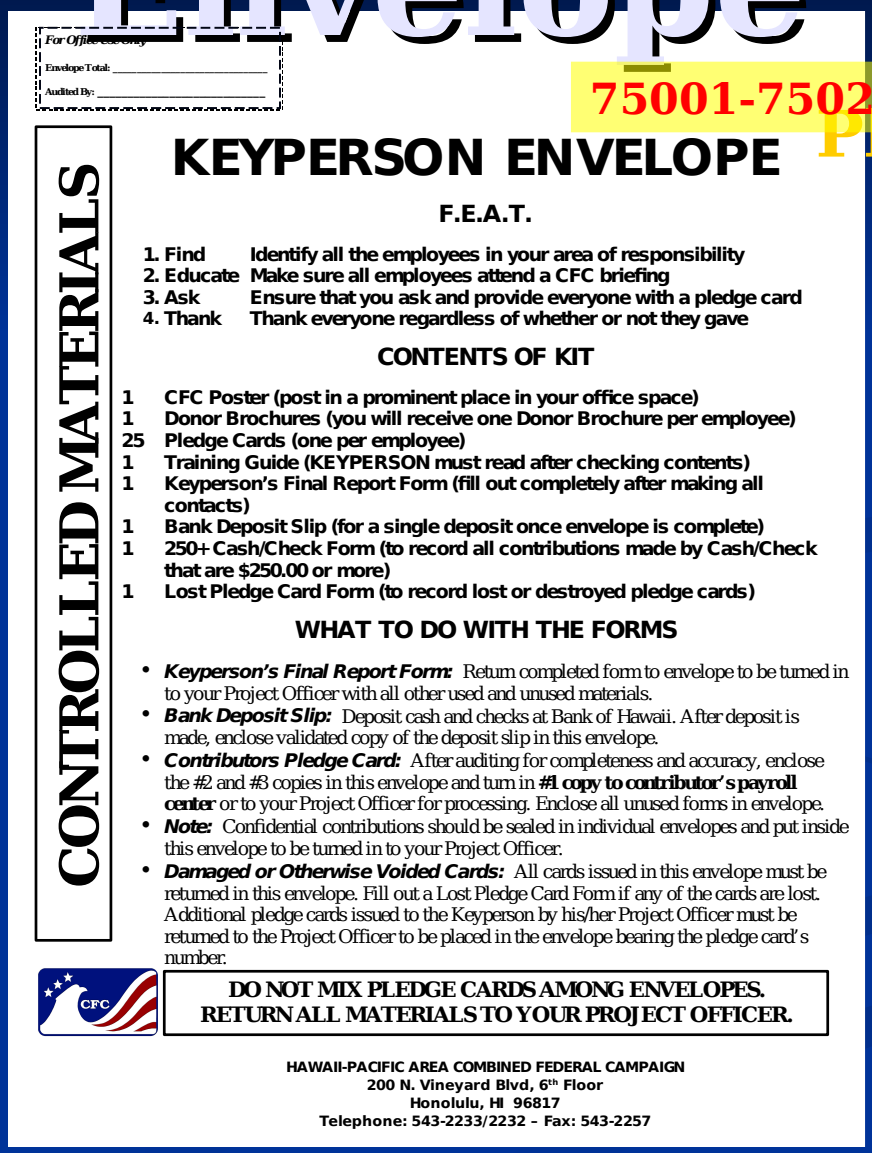
WHAT TO DO WITH THE FORMS

- ***Keyperson's Final Report Form:*** Return completed form to envelope to be turned in to your Project Officer with all other used and unused materials.
- ***Bank Deposit Slip:*** Deposit cash and checks at Bank of Hawaii. After deposit is made, enclose validated copy of the deposit slip in this envelope.
- ***Contributors Pledge Card:*** After auditing for completeness and accuracy, enclose the #2 and #3 copies in this envelope and turn in **#1 copy to contributor's payroll center** or to your Project Officer for processing. Enclose all unused forms in envelope.
- ***Note:*** Confidential contributions should be sealed in individual envelopes and put inside this envelope to be turned in to your Project Officer.
- ***Damaged or Otherwise Voided Cards:*** All cards issued in this envelope must be returned in this envelope. Fill out a Lost Pledge Card Form if any of the cards are lost. Additional pledge cards issued to the Keyperson by his/her Project Officer must be returned to the Project Officer to be placed in the envelope bearing the pledge card's number.

DO NOT MIX PLEDGE CARDS AMONG ENVELOPES.
RETURN ALL MATERIALS TO YOUR PROJECT OFFICER.

HAWAII-PACIFIC AREA COMBINED FEDERAL CAMPAIGN
200 N. Vineyard Blvd, 6th Floor
Honolulu, HI 96817
Telephone: 543-2233/2232 – Fax: 543-2257

Keyperson's Envelope



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Envelope Total: _____

Audited By: _____

75001-75025 Pledge Card #

CONTROLLED MATERIALS

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Honolulu, HI 96817
Telephone: 543-2233/2232 – Fax: 543-2257

AGENCY CODE

Training guide page 20

DISTRIBUTION:
WHITE — CFC HQS
YELLOW — AGENCY PROJECT OFFICER
PINK — KEYPERSON

KEYPERSON'S FINAL REPORT

HAWAII — PACIFIC AREA
COMBINED FEDERAL CAMPAIGN

AGENCY CODE 18

3001

KEYPERSON'S ORGANIZATION: United States Coast Guard USS Kaka

ZIP CODE NUMBER

INSTRUCTIONS TO KEYPERSON
Keyperson's Final Report

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KEYPERSON AND PROJECT OFFICER MUST BOTH SIGN: We verify that we have reviewed the pledge cards, deposit slips and this report for completeness and accuracy.

PLEDGE CARD NO.	NAMES OF PERSONS CONTRIBUTING (PLEASE TYPE OR PRINT USING BALL POINT PEN AND PRESS FIRMLY)	AMOUNT CONTRIBUTED BY CASH/ CHECKS (1)	AMOUNT CONTRIBUTED TOTAL ANNUAL PAYROLL DEDUCTION (2)	EAGLE GIVER	SUPER EAGLE GIVER
75001	Mary Poppins				
75002	Duck McQuack				
75003	Capt O'Hara				
75004	Bahhumbug Scrooge				
75025	NOT USED				
	TOTAL				

(Keyperson's Signature)

Work Phone: _____

(Signature of Keyperson's Project Officer)

Work Phone: _____

Date: _____

NOTE: SUBMIT ALL #1 COPIES OF THE PAYROLL DEDUCTION CONTRIBUTOR'S PLEDGE CARDS TO PAYROLL OFFICE FOR PROCESSING.

CONTRIBUTIONS

3. CASH/CHECKS — DONORS | AMOUNT

4. PAYROLL DEDUCTIONS — DONORS | AMOUNT

5. CONFIDENTIAL GIFTS — DONORS

6. TOTALS — DONORS | AMOUNT

CEO INITIALS

DATE

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AGENCY CODE | REPORT #

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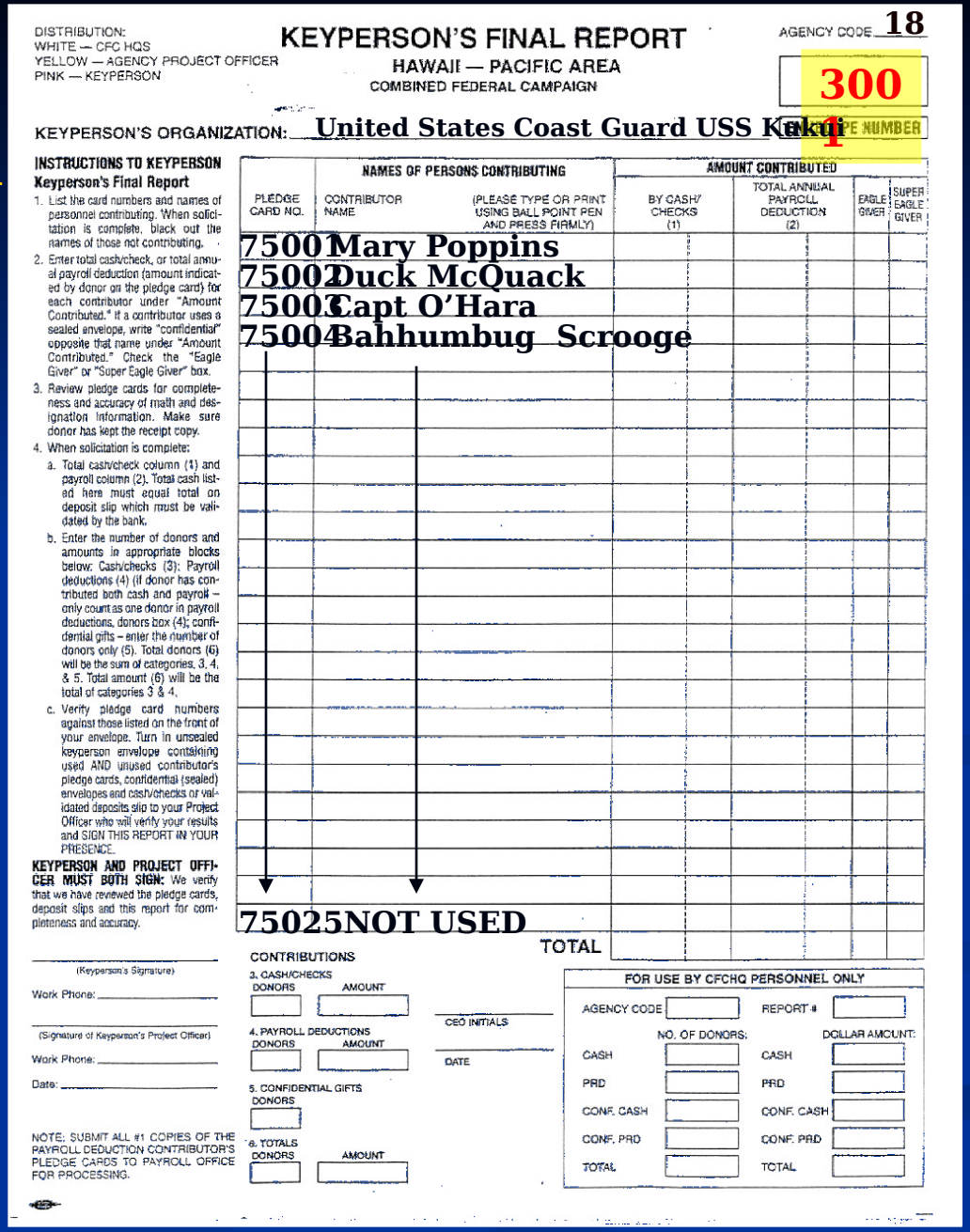
CASH		CASH
PRD		PRD
CONF. CASH		CONF. CASH
CONF. PRD		CONF. PRD
TOTAL		TOTAL

ENVELOPE NUMBER (preprinted)

Training guide page 20



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PINK — KEYPERSON

KEYPERSON'S FINAL REPORT

HAWAII — PACIFIC AREA
COMBINED FEDERAL CAMPAIGN

AGENCY CODE 18

300
1

KEYPERSON'S ORGANIZATION: United States Coast Guard USS Kukui

INSTRUCTIONS TO KEYPERSON
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75025	NOT USED				
	TOTAL				

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6. TOTALS — DONORS / AMOUNT

CEO INITIALS

DATE

FOR USE BY CFCHQ PERSONNEL ONLY

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CASH		CASH
PRD		PRD
CONF. CASH		CONF. CASH
CONF. PRD		CONF. PRD
TOTAL		TOTAL

ORGANIZATION AND UNIT/DEPT

Training guide page 20

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KEYPERSON'S FINAL REPORT

HAWAII — PACIFIC AREA
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KEYPERSON'S ORGANIZATION: United States Coast Guard USS Kukui 1

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PLEDGE CARD

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AGENCY CODE 18

300

1

KEYPERSON'S ORGANIZATION: United States Coast Guard USS Kauka

TYPE NUMBER

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CONTRIBUTOR NAME

Training guide page 20

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HAWAII — PACIFIC AREA
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CONTRIBUTIONS

3. CASH/CHECKS — DONORS | AMOUNT

4. PAYROLL DEDUCTIONS — DONORS | AMOUNT

5. CONFIDENTIAL GIFTS — DONORS

6. TOTALS — DONORS | AMOUNT

CEO INITIALS

DATE

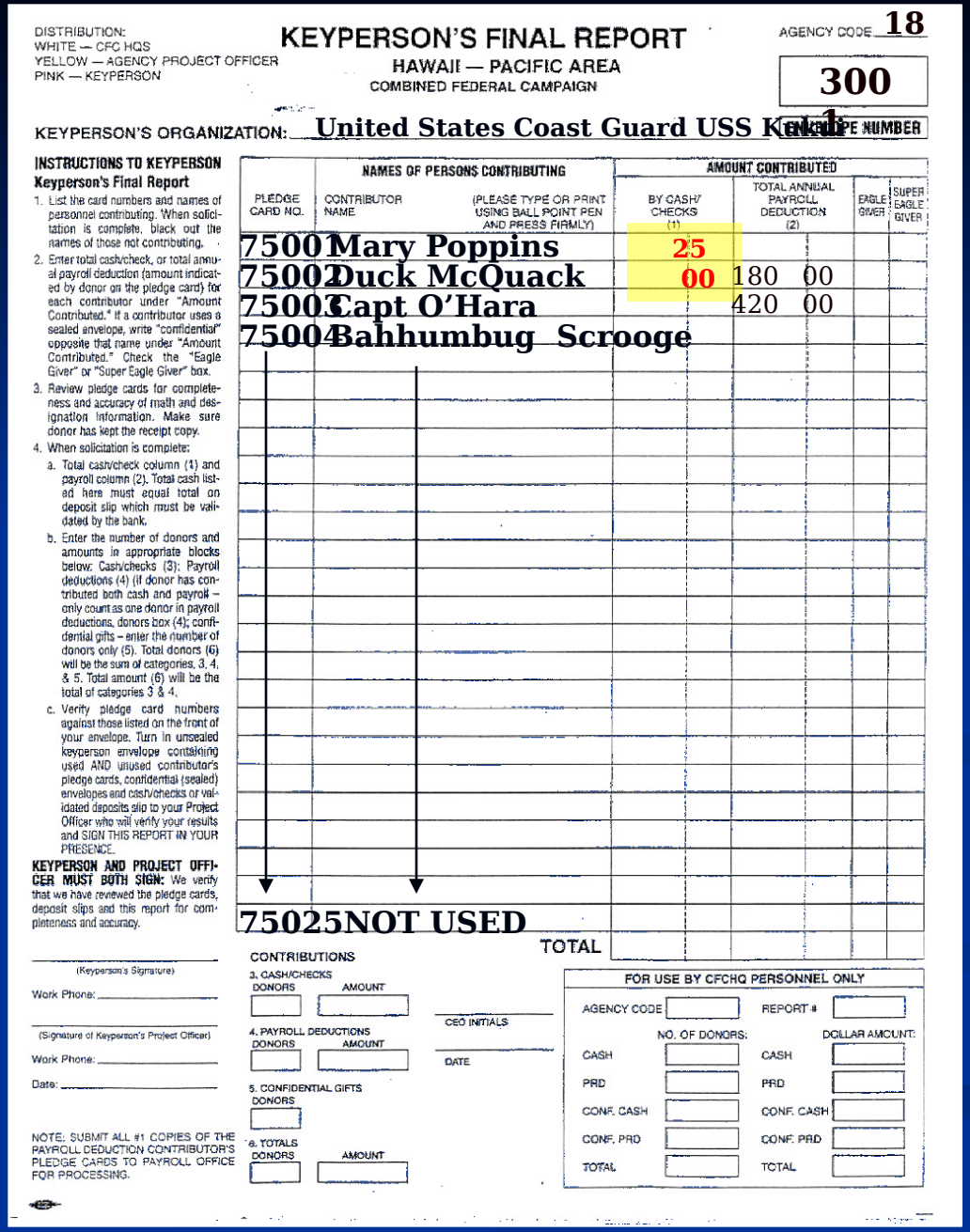
FOR USE BY CFCHQ PERSONNEL ONLY

AGENCY CODE | REPORT #

	NO. OF DONORS:	DOLLAR AMOUNT:
CASH		CASH
PRD		PRD
CONF. CASH		CONF. CASH
CONF. PRD		CONF. PRD
TOTAL		TOTAL

DONATIONS BY CASH/CHECK COLUMN

Training guide page 20



DISTRIBUTION:
WHITE — CFC HQS
YELLOW — AGENCY PROJECT OFFICER
PINK — KEYPERSON

KEYPERSON'S FINAL REPORT

HAWAII — PACIFIC AREA
COMBINED FEDERAL CAMPAIGN

AGENCY CODE 18

300

1

KEYPERSON'S ORGANIZATION: United States Coast Guard USS Kauka

INSTRUCTIONS TO KEYPERSON
Keyperson's Final Report

1. List the card numbers and names of personnel contributing. When solicitation is complete, black out the names of those not contributing.
2. Enter total cash/check, or total annual payroll deduction (amount indicated by donor on the pledge card) for each contributor under "Amount Contributed." If a contributor uses a sealed envelope, write "confidential" opposite that name under "Amount Contributed." Check the "Eagle Giver" or "Super Eagle Giver" box.
3. Review pledge cards for completeness and accuracy of math and designation information. Make sure donor has kept the receipt copy.
4. When solicitation is complete:
   a. Total cash/check column (1) and payroll column (2). Total cash listed here must equal total on deposit slip which must be validated by the bank.
   b. Enter the number of donors and amounts in appropriate blocks below: Cash/checks (3); Payroll deductions (4) (if donor has contributed both cash and payroll – only count as one donor in payroll deductions, donors box (4); confidential gifts – enter the number of donors only (5). Total donors (6) will be the sum of categories, 3, 4, & 5. Total amount (6) will be the total of categories 3 & 4.
   c. Verify pledge card numbers against those listed on the front of your envelope. Turn in unsealed keyperson envelope containing used AND unused contributor's pledge cards, confidential (sealed) envelopes and cash/checks or validated deposits slip to your Project Officer who will verify your results and SIGN THIS REPORT IN YOUR PRESENCE.

KEYPERSON AND PROJECT OFFICER MUST BOTH SIGN: We verify that we have reviewed the pledge cards, deposit slips and this report for completeness and accuracy.

(Keyperson's Signature)

Work Phone:

(Signature of Keyperson's Project Officer)

Work Phone:

Date:

NOTE: SUBMIT ALL #1 COPIES OF THE PAYROLL DEDUCTION CONTRIBUTOR'S PLEDGE CARDS TO PAYROLL OFFICE FOR PROCESSING.

PLEDGE CARD NO.	NAMES OF PERSONS CONTRIBUTING (PLEASE TYPE OR PRINT USING BALL POINT PEN AND PRESS FIRMLY) CONTRIBUTOR NAME	AMOUNT CONTRIBUTED BY CASH/ CHECKS (1)	TOTAL ANNUAL PAYROLL DEDUCTION (2)	EAGLE GIVER	SUPER EAGLE GIVER
75001	Mary Poppins	25			
75002	Duck McQuack	00	180 00		
75003	Capt O'Hara		420 00		
75004	Bahhumbug Scrooge				
75025	NOT USED				
	TOTAL				

CONTRIBUTIONS

3. CASH/CHECKS — DONORS / AMOUNT

4. PAYROLL DEDUCTIONS — DONORS / AMOUNT

5. CONFIDENTIAL GIFTS — DONORS

6. TOTALS — DONORS / AMOUNT

CEO INITIALS

DATE

FOR USE BY CFCHQ PERSONNEL ONLY

AGENCY CODE | REPORT #

	NO. OF DONORS:	DOLLAR AMOUNT:
CASH		CASH
PRD		PRD
CONF. CASH		CONF. CASH
CONF. PRD		CONF. PRD
TOTAL		TOTAL

TOTAL ANNUAL PAYROLL DEDUCTION COLUMN

Training guide page 20

DISTRIBUTION:
WHITE — CFC HQS
YELLOW — AGENCY PROJECT OFFICER
PINK — KEYPERSON

KEYPERSON'S FINAL REPORT

HAWAII — PACIFIC AREA
COMBINED FEDERAL CAMPAIGN

AGENCY CODE 18

300

ENVELOPE NUMBER 1

KEYPERSON'S ORGANIZATION: United States Coast Guard USS Kidd

INSTRUCTIONS TO KEYPERSON
Keyperson's Final Report

1. List the card numbers and names of personnel contributing. When solicitation is complete, black out the names of those not contributing.
2. Enter total cash/check, or total annual payroll deduction (amount indicated by donor on the pledge card) for each contributor under "Amount Contributed." If a contributor uses a sealed envelope, write "confidential" opposite that name under "Amount Contributed." Check the "Eagle Giver" or "Super Eagle Giver" box.
3. Review pledge cards for completeness and accuracy of math and designation information. Make sure donor has kept the receipt copy.
4. When solicitation is complete:
   a. Total cash/check column (1) and payroll column (2). Total cash listed here must equal total on deposit slip which must be validated by the bank.
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KEYPERSON AND PROJECT OFFICER MUST BOTH SIGN: We verify that we have reviewed the pledge cards, deposit slips and this report for completeness and accuracy.

PLEDGE CARD NO.	NAMES OF PERSONS CONTRIBUTING — CONTRIBUTOR NAME (PLEASE TYPE OR PRINT USING BALL POINT PEN AND PRESS FIRMLY)	AMOUNT CONTRIBUTED — BY CASH/ CHECKS (1)	TOTAL ANNUAL PAYROLL DEDUCTION (2)	EAGLE GIVER	SUPER EAGLE GIVER
75001	Mary Poppins	25 00			
75002	Duck McQuack		180 00		
75003	Capt O'Hara		420 00		
75004	Bahhumbug Scrooge				
75025	NOT USED				
			TOTAL		

(Keyperson's Signature)

Work Phone:

(Signature of Keyperson's Project Officer)

Work Phone:

Date:

NOTE: SUBMIT ALL #1 COPIES OF THE PAYROLL DEDUCTION CONTRIBUTOR'S PLEDGE CARDS TO PAYROLL OFFICE FOR PROCESSING.

CONTRIBUTIONS

3. CASH/CHECKS — DONORS | AMOUNT
4. PAYROLL DEDUCTIONS — DONORS | AMOUNT
5. CONFIDENTIAL GIFTS — DONORS
6. TOTALS — DONORS | AMOUNT

CEO INITIALS

DATE

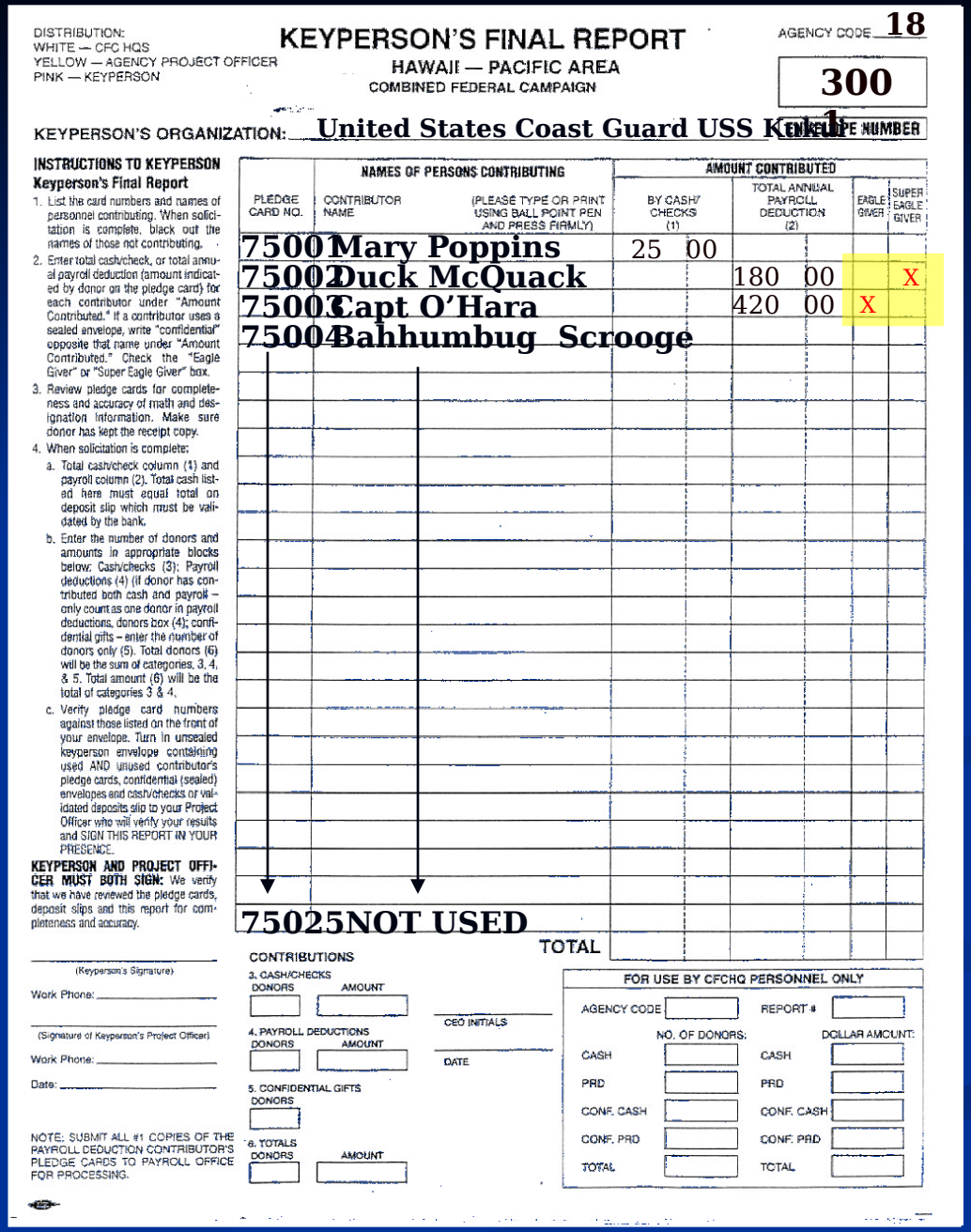
FOR USE BY CFCHQ PERSONNEL ONLY

AGENCY CODE | REPORT #

	NO. OF DONORS:	DOLLAR AMOUNT:
CASH		CASH
PRD		PRD
CONF. CASH		CONF. CASH
CONF. PRD		CONF. PRD
TOTAL		TOTAL

AWARDS BLOCK EAGLE AND SUPER EAGLE

Training guide page 20



DISTRIBUTION:
WHITE — CFC HQS
YELLOW — AGENCY PROJECT OFFICER
PINK — KEYPERSON

KEYPERSON'S FINAL REPORT

HAWAII — PACIFIC AREA
COMBINED FEDERAL CAMPAIGN

AGENCY CODE 18

300

ENVELOPE NUMBER 1

KEYPERSON'S ORGANIZATION: United States Coast Guard USS Kedlubr

INSTRUCTIONS TO KEYPERSON
Keyperson's Final Report

1. List the card numbers and names of personnel contributing. When solicitation is complete, black out the names of those not contributing.
2. Enter total cash/check, or total annual payroll deduction (amount indicated by donor on the pledge card) for each contributor under "Amount Contributed." If a contributor uses a sealed envelope, write "confidential" opposite that name under "Amount Contributed." Check the "Eagle Giver" or "Super Eagle Giver" box.
3. Review pledge cards for completeness and accuracy of math and designation information. Make sure donor has kept the receipt copy.
4. When solicitation is complete:
   a. Total cash/check column (1) and payroll column (2). Total cash listed here must equal total on deposit slip which must be validated by the bank.
   b. Enter the number of donors and amounts in appropriate blocks below: Cash/checks (3); Payroll deductions (4) (if donor has contributed both cash and payroll – only count as one donor in payroll deductions, donors box (4); confidential gifts – enter the number of donors only (5). Total donors (6) will be the sum of categories, 3, 4, & 5. Total amount (6) will be the total of categories 3 & 4.
   c. Verify pledge card numbers against those listed on the front of your envelope. Turn in unsealed keyperson envelope containing used AND unused contributor's pledge cards, confidential (sealed) envelopes and cash/checks or validated deposits slip to your Project Officer who will verify your results and SIGN THIS REPORT IN YOUR PRESENCE.

KEYPERSON AND PROJECT OFFICER MUST BOTH SIGN: We verify that we have reviewed the pledge cards, deposit slips and this report for completeness and accuracy.

PLEDGE CARD NO.	NAMES OF PERSONS CONTRIBUTING (PLEASE TYPE OR PRINT USING BALL POINT PEN AND PRESS FIRMLY)	AMOUNT CONTRIBUTED BY CASH/ CHECKS (1)	TOTAL ANNUAL PAYROLL DEDUCTION (2)	EAGLE GIVER	SUPER EAGLE GIVER
75001	Mary Poppins	25 00			
75002	Duck McQuack		180 00		X
75003	Capt O'Hara		420 00	X	
75004	Bahhumbug Scrooge				
75025	NOT USED				
	TOTAL				

(Keyperson's Signature)

Work Phone:

(Signature of Keyperson's Project Officer)

Work Phone:

Date:

NOTE: SUBMIT ALL #1 COPIES OF THE PAYROLL DEDUCTION CONTRIBUTOR'S PLEDGE CARDS TO PAYROLL OFFICE FOR PROCESSING.

CONTRIBUTIONS

3. CASH/CHECKS — DONORS / AMOUNT
4. PAYROLL DEDUCTIONS — DONORS / AMOUNT
5. CONFIDENTIAL GIFTS — DONORS
6. TOTALS — DONORS / AMOUNT

CEO INITIALS

DATE

FOR USE BY CFCHQ PERSONNEL ONLY

AGENCY CODE / REPORT #

	NO. OF DONORS:	DOLLAR AMOUNT:
CASH		CASH
PRD		PRD
CONF. CASH		CONF. CASH
CONF. PRD		CONF. PRD
TOTAL		TOTAL

BLOCK OUT NON CONTRIBUTOR'S NAME

Training guide page 20

DISTRIBUTION:
WHITE — CFC HQS
YELLOW — AGENCY PROJECT OFFICER
PINK — KEYPERSON

KEYPERSON'S FINAL REPORT

HAWAII — PACIFIC AREA
COMBINED FEDERAL CAMPAIGN

AGENCY CODE 18

300

ENVELOPE NUMBER 1

KEYPERSON'S ORGANIZATION: United States Coast Guard USS Kauai

INSTRUCTIONS TO KEYPERSON
Keyperson's Final Report

1. List the card numbers and names of personnel contributing. When solicitation is complete, black out the names of those not contributing.
2. Enter total cash/check, or total annual payroll deduction (amount indicated by donor on the pledge card) for each contributor under "Amount Contributed." If a contributor uses a sealed envelope, write "confidential" opposite that name under "Amount Contributed." Check the "Eagle Giver" or "Super Eagle Giver" box.
3. Review pledge cards for completeness and accuracy of math and designation information. Make sure donor has kept the receipt copy.
4. When solicitation is complete:
   a. Total cash/check column (1) and payroll column (2). Total cash listed here must equal total on deposit slip which must be validated by the bank.
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KEYPERSON AND PROJECT OFFICER MUST BOTH SIGN: We verify that we have reviewed the pledge cards, deposit slips and this report for completeness and accuracy.

PLEDGE CARD NO.	NAMES OF PERSONS CONTRIBUTING — CONTRIBUTOR NAME (PLEASE TYPE OR PRINT USING BALL POINT PEN AND PRESS FIRMLY)	AMOUNT CONTRIBUTED — BY CASH/ CHECKS (1)	TOTAL ANNUAL PAYROLL DEDUCTION (2)	EAGLE GIVER	SUPER EAGLE GIVER
75001	Mary Poppins	25 00			
75002	Duck McQuack		180 00		X
75003	Capt. O'Hara		420 00	X	
75004	[redacted] ooge				
75025	NOT USED				
	TOTAL				

(Keyperson's Signature)

Work Phone:

(Signature of Keyperson's Project Officer)

Work Phone:

Date:

NOTE: SUBMIT ALL #1 COPIES OF THE PAYROLL DEDUCTION CONTRIBUTOR'S PLEDGE CARDS TO PAYROLL OFFICE FOR PROCESSING.

CONTRIBUTIONS

3. CASH/CHECKS — DONORS | AMOUNT
4. PAYROLL DEDUCTIONS — DONORS | AMOUNT
5. CONFIDENTIAL GIFTS — DONORS
6. TOTALS — DONORS | AMOUNT

CEO INITIALS

DATE

FOR USE BY CFCHQ PERSONNEL ONLY

AGENCY CODE | REPORT #

	NO. OF DONORS:	DOLLAR AMOUNT:
CASH		CASH
PRD		PRD
CONF. CASH		CONF. CASH
CONF. PRD		CONF. PRD
TOTAL		TOTAL

Training guide page 20

TOTAL CASH/CHECK AND PAYROLL DEDUCTION COLUMNS

DISTRIBUTION:
WHITE — CFC HQS
YELLOW — AGENCY PROJECT OFFICER
PINK — KEYPERSON

KEYPERSON'S FINAL REPORT

HAWAII — PACIFIC AREA
COMBINED FEDERAL CAMPAIGN

AGENCY CODE 18

300

ENVELOPE NUMBER 1

KEYPERSON'S ORGANIZATION: United States Coast Guard USS Kauf

INSTRUCTIONS TO KEYPERSON
Keyperson's Final Report

1. List the card numbers and names of personnel contributing. When solicitation is complete, black out the names of those not contributing.
2. Enter total cash/check, or total annual payroll deduction (amount indicated by donor on the pledge card) for each contributor under "Amount Contributed." If a contributor uses a sealed envelope, write "confidential" opposite that name under "Amount Contributed." Check the "Eagle Giver" or "Super Eagle Giver" box.
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KEYPERSON AND PROJECT OFFICER MUST BOTH SIGN: We verify that we have reviewed the pledge cards, deposit slips and this report for completeness and accuracy.

PLEDGE CARD NO.	NAMES OF PERSONS CONTRIBUTING (CONTRIBUTOR NAME — PLEASE TYPE OR PRINT USING BALL POINT PEN AND PRESS FIRMLY)	AMOUNT CONTRIBUTED: BY CASH/CHECKS (1)	TOTAL ANNUAL PAYROLL DEDUCTION (2)	EAGLE GIVER	SUPER EAGLE GIVER
75001	Mary Poppins	25 00			
75002	Duck McQuack		180 00		X
75003	Capt. O'Hara		420 00	X	
7500[redacted]	[redacted]ooge				
75025	NOT USED				
	TOTAL	25 00	600 00		

(Keyperson's Signature)

Work Phone:

(Signature of Keyperson's Project Officer)

Work Phone:

Date:

NOTE: SUBMIT ALL #1 COPIES OF THE PAYROLL DEDUCTION CONTRIBUTOR'S PLEDGE CARDS TO PAYROLL OFFICE FOR PROCESSING.

CONTRIBUTIONS

3. CASH/CHECKS — DONORS | AMOUNT
4. PAYROLL DEDUCTIONS — DONORS | AMOUNT
5. CONFIDENTIAL GIFTS — DONORS
6. TOTALS — DONORS | AMOUNT

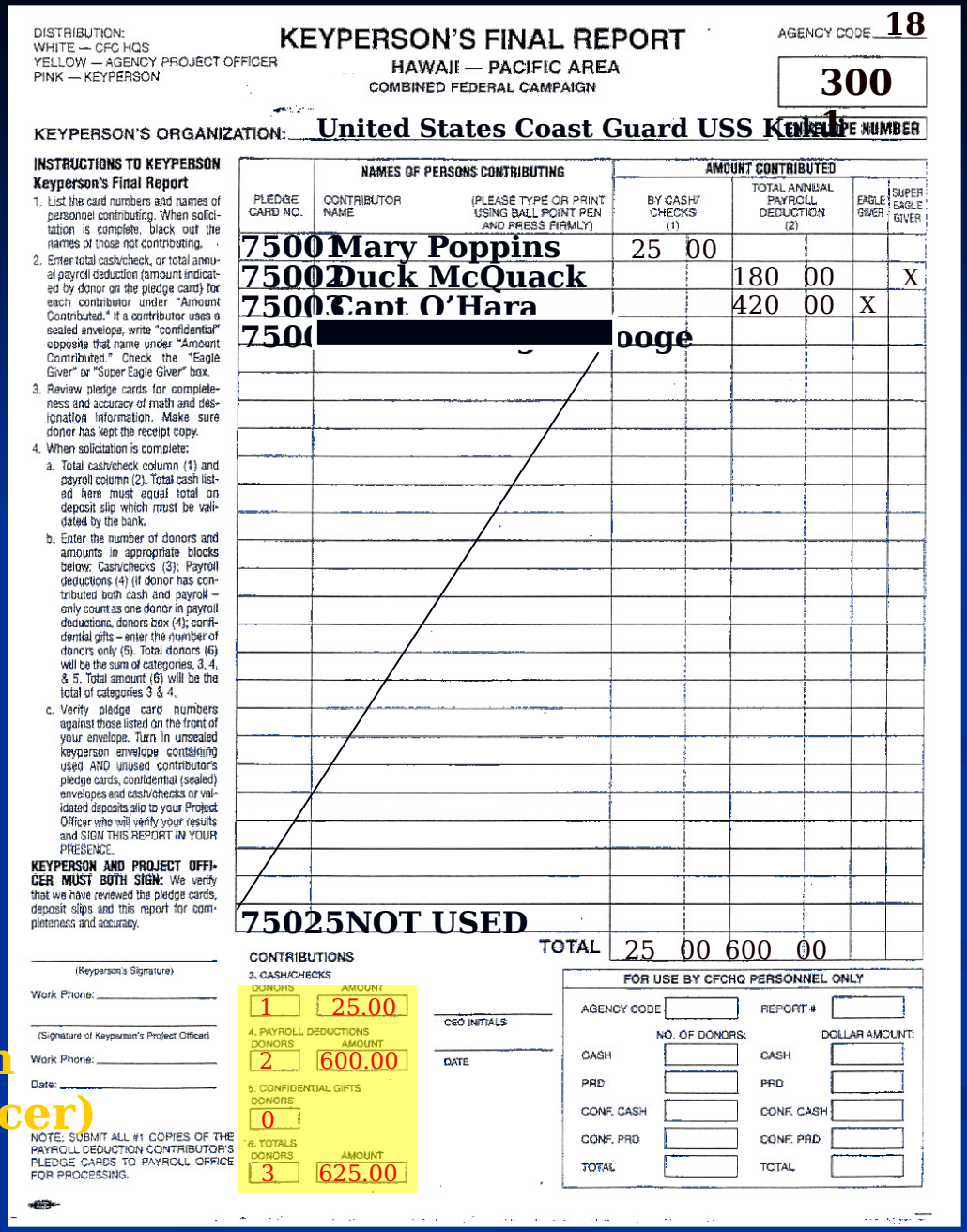
CEO INITIALS

DATE

FOR USE BY CFCHQ PERSONNEL ONLY

AGENCY CODE | REPORT #

	NO. OF DONORS:	DOLLAR AMOUNT:
CASH		CASH
PRD		PRD
CONF. CASH		CONF. CASH
CONF. PRD		CONF. PRD
TOTAL		TOTAL



DISTRIBUTION:
WHITE — CFC HQS
YELLOW — AGENCY PROJECT OFFICER
PINK — KEYPERSON

KEYPERSON'S FINAL REPORT

HAWAII — PACIFIC AREA
COMBINED FEDERAL CAMPAIGN

AGENCY CODE 18

300

ENVELOPE NUMBER 1

KEYPERSON'S ORGANIZATION: United States Coast Guard USS Kauf

INSTRUCTIONS TO KEYPERSON
Keyperson's Final Report

1. List the card numbers and names of personnel contributing. When solicitation is complete, black out the names of those not contributing.
2. Enter total cash/check, or total annual payroll deduction (amount indicated by donor on the pledge card) for each contributor under "Amount Contributed." If a contributor uses a sealed envelope, write "confidential" opposite that name under "Amount Contributed." Check the "Eagle Giver" or "Super Eagle Giver" box.
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KEYPERSON AND PROJECT OFFICER MUST BOTH SIGN: We verify that we have reviewed the pledge cards, deposit slips and this report for completeness and accuracy.

PLEDGE CARD NO.	NAMES OF PERSONS CONTRIBUTING — CONTRIBUTOR NAME (PLEASE TYPE OR PRINT USING BALL POINT PEN AND PRESS FIRMLY)	AMOUNT CONTRIBUTED — BY CASH/ CHECKS (1)	TOTAL ANNUAL PAYROLL DEDUCTION (2)	EAGLE GIVER	SUPER EAGLE GIVER
75001	Mary Poppins	25 00			
75002	Duck McQuack		180 00		X
75003	Capt. O'Hara		420 00	X	
75004	[redacted]				
75025	NOT USED				
	TOTAL	25 00	600 00		

(Keyperson's Signature)

Work Phone:

(Signature of Keyperson's Project Officer)

Work Phone:

Date:

NOTE: SUBMIT ALL #1 COPIES OF THE PAYROLL DEDUCTION CONTRIBUTOR'S PLEDGE CARDS TO PAYROLL OFFICE FOR PROCESSING.

CONTRIBUTIONS

3. CASH/CHECKS — DONORS: 1 — AMOUNT: 25.00
4. PAYROLL DEDUCTIONS — DONORS: 2 — AMOUNT: 600.00
5. CONFIDENTIAL GIFTS — DONORS: 0
6. TOTALS — DONORS: 3 — AMOUNT: 625.00

CEO INITIALS

DATE

FOR USE BY CFCHQ PERSONNEL ONLY

AGENCY CODE | REPORT #

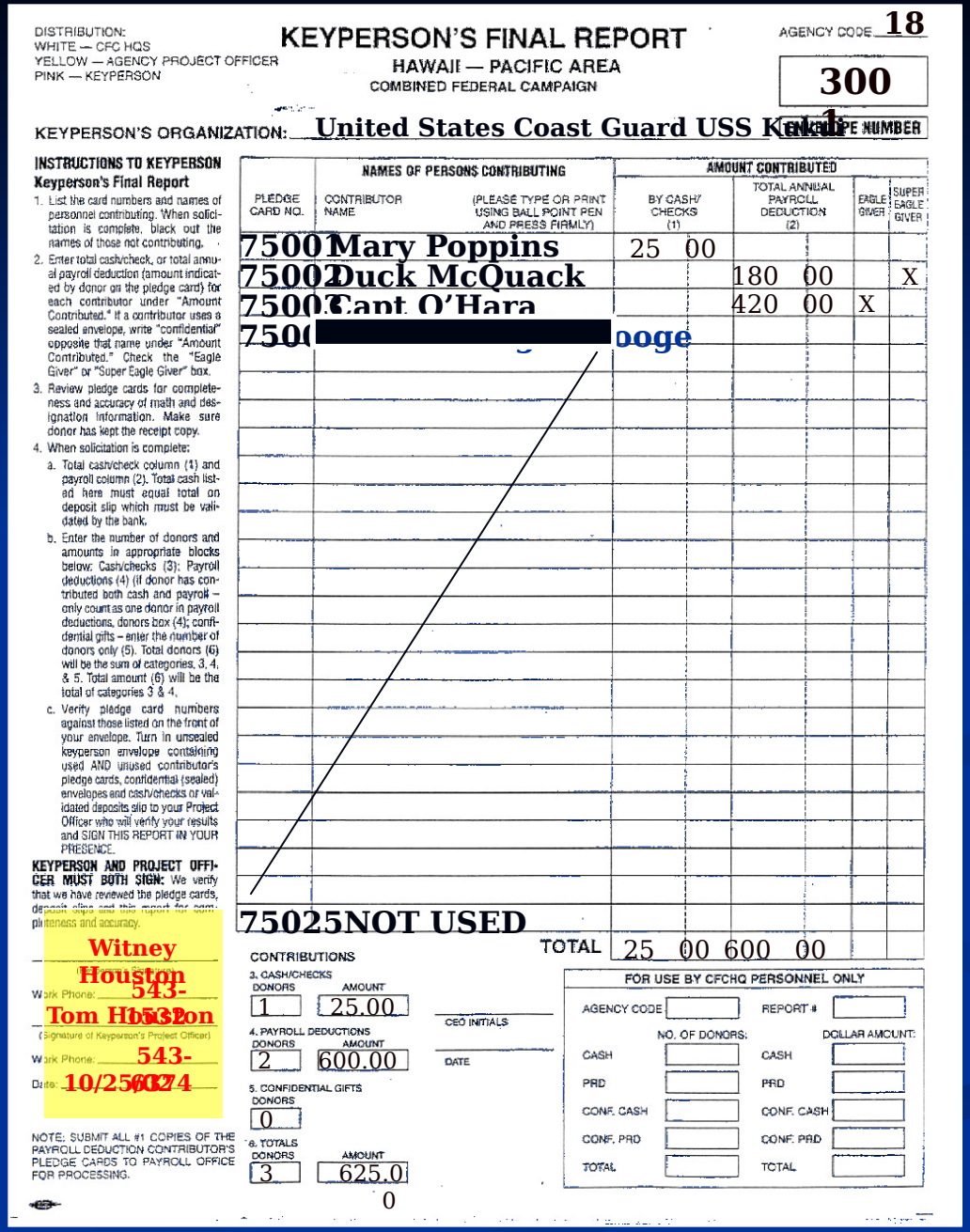
	NO. OF DONORS:	DOLLAR AMOUNT:
CASH		CASH
PRD		PRD
CONF. CASH		CONF. CASH
CONF. PRD		CONF. PRD
TOTAL		TOTAL

COMPLETE CONTRIBUTIONS SECTION (completed by Keyperson dited by Unit Project Officer)

Training guide page 20

KEYPERSON AND UNIT PROJECT OFFICERS SIGN

Training guide page 20



DISTRIBUTION:
WHITE — CFC HQS
YELLOW — AGENCY PROJECT OFFICER
PINK — KEYPERSON

KEYPERSON'S FINAL REPORT

HAWAII — PACIFIC AREA
COMBINED FEDERAL CAMPAIGN

AGENCY CODE 18

300

1

KEYPERSON'S ORGANIZATION: United States Coast Guard USS Kauka

INSTRUCTIONS TO KEYPERSON

Keyperson's Final Report

1. List the card numbers and names of personnel contributing. When solicitation is complete, black out the names of those not contributing.
2. Enter total cash/check, or total annual payroll deduction (amount indicated by donor on the pledge card) for each contributor under "Amount Contributed." If a contributor uses a sealed envelope, write "confidential" opposite that name under "Amount Contributed." Check the "Eagle Giver" or "Super Eagle Giver" box.
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4. When solicitation is complete:
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KEYPERSON AND PROJECT OFFICER MUST BOTH SIGN: We verify that we have reviewed the pledge cards, deposit slips and this report for completeness and accuracy.

Witney Houston
(Keyperson Signature)
Work Phone: 543-
Tom Hobson
(Signature of Keyperson's Project Officer)
Work Phone: 543-
Date: 10/25/07

NOTE: SUBMIT ALL #1 COPIES OF THE PAYROLL DEDUCTION CONTRIBUTOR'S PLEDGE CARDS TO PAYROLL OFFICE FOR PROCESSING.

PLEDGE CARD NO.	NAMES OF PERSONS CONTRIBUTING (PLEASE TYPE OR PRINT USING BALL POINT PEN AND PRESS FIRMLY)	AMOUNT CONTRIBUTED: BY CASH/CHECKS (1)	TOTAL ANNUAL PAYROLL DEDUCTION (2)	EAGLE GIVER	SUPER EAGLE GIVER
75001	Mary Poppins	25 00			
75002	Duck McQuack		180 00		X
75003	Capt. O'Hara		420 00	X	
7500[redacted]	[redacted]ooge				
75025	NOT USED				
	TOTAL	25 00	600 00		

CONTRIBUTIONS

3. CASH/CHECKS — DONORS: 1 — AMOUNT: 25.00
4. PAYROLL DEDUCTIONS — DONORS: 2 — AMOUNT: 600.00
5. CONFIDENTIAL GIFTS — DONORS: 0
6. TOTALS — DONORS: 3 — AMOUNT: 625.0 0

CEO INITIALS

DATE

FOR USE BY CFCHQ PERSONNEL ONLY

	NO. OF DONORS:	DOLLAR AMOUNT:
AGENCY CODE		REPORT #
CASH		CASH
PRD		PRD
CONF. CASH		CONF. CASH
CONF. PRD		CONF. PRD
TOTAL		TOTAL

Keyperson's Final Report

- List all pledge card numbers and names
  - Use Alpha Roster
- Line out non-contributors names
- Keep a list of award donors only (if needed)
- Return all used, unused, and voided cards
- Total columns
- Sign and give contact number
- Return completed envelope to Project Officer for final audit

Pledge Card

Training guide page 22

Name and Envelope Number Prepared by Keyperson

MILITARY UNIT/FEDERAL DEPT./AGENCY | DUTY PHONE | PAY GRADE (optional) | SOCIAL SECURITY NUMBER

USA, Schofield, Co. A,

CONTRIBUTION: Indicate the amount of your payroll allotment, cash or check contribution. Write in the total of your annual contribution in the space provided.

✓BOX	MILITARY	TOTAL
	$ _____ X 12 MONTHS =	$
	$35.00 X 12 MONTHS =	$420.00
	$25.00 X 12 MONTHS =	$300.00
	$15.00 X 12 MONTHS =	$180.00
	CASH OR CHECK	$

PRINT NEATLY

KEYPERSON ENVELOPE NUMBER

3001

MAKE CHECK PAYABLE TO:
COMBINED FEDERAL CAMPAIGN

✓BOX	CIVILIAN	TOTAL
	$ _____ X 26 PAY PERIODS =	$
	$16.00 X 26 PAY PERIODS =	$416.00
	$12.00 X 26 PAY PERIODS =	$312.00
	$ 7.00 X 26 PAY PERIODS =	$182.00
	CASH OR CHECK	$

DESIGNATED GIFTS: To designate one or more charities or federated group that appear on the list provided, fill in the charity or federation code(s) and dollar amounts(s) below..

USE CODES FROM 2005 BROCHURE ONLY

FOUR DIGIT CHARITY CODE	ANNUAL AMOUNT
	$
	$
	$
	$
	$

RECOGNITION OPTIONS

Check ONE Box: If both boxes are checked, no information will be released.

☐ DO NOT release any information to charities.

☐ Release my name and the (optional) home address and/or home email contact information I provide below to all the charities I designated. If I do not provide home contact information, only my name will be released.

CFC Organizations do not provide goods or services in whole or partial consideration for any contributions made to the organizations via this pledge card.

PAYROLL DEDUCTION AUTHORIZATION

I hereby authorize any agency of the United States Government by which I may be employed during 2006 to deduct the amount(s) shown above from my pay each pay period during the calendar year 2006 starting with the first pay period that begins in January and ending with the last pay period that begins in December, and to pay the amounts so deducted to the Combined Federal Campaign shown above. I understand that this authorization may be revoked by me in writing at any time before it expires.

Signature _____ Date _____

☐ VOLUNTEER: I would like to be a workplace CFC volunteer next year. Please contact me for more information at:

OPM Form 1654 June 2005

Pledge Card

Training guide page 22

7500 ☐ Super Eagle Giver ☐ Eagle Giver

2005 Hawaii-Pacific Area
Combined Federal Campaign
P.O. Box 1096 Honolulu, Hawaii 96808

OPM CFC Control number 0225
ATTENTION PAYROLL OFFICES:
This number identifies the local CFC
DO NOT enter into Federal payroll systems

NAME (LAST)	(FIRST)	(MIDDLE INITIAL)	UNIT/DIVISION AND PAYROLL OFFICE (optional)
1 Thomas	Paul	J	

MILITARY UNIT/FEDERAL DEPT./AGENCY	DUTY PHONE	PAY GRADE (optional)	SOCIAL SECURITY NUMBER
USA, Schofield, Co. A,	546-2213	E5	555-12-1212

CONTRIBUTION: Indicate the amount of your payroll allotment, cash or check contribution. Write in the total of your annual contribution in the space provided.

MILITARY ← OR → CIVILIAN

✓BOX		TOTAL
	$ _____ X 12 MONTHS =	$
	$35.00 X 12 MONTHS =	$420.00
	$25.00 X 12 MONTHS =	$300.00
X	$15.00 X 12 MONTHS =	$180.00
	CASH OR CHECK	$

PRINT NEATLY
KEYPERSON ENVELOPE NUMBER
3001
MAKE CHECK PAYABLE TO:
COMBINED FEDERAL CAMPAIGN

✓BOX		TOTAL
	$ _____ X 26 PAY PERIODS =	$
	$16.00 X 26 PAY PERIODS =	$416.00
	$12.00 X 26 PAY PERIODS =	$312.00
	$ 7.00 X 26 PAY PERIODS =	$182.00
	CASH OR CHECK	$

DESIGNATED GIFTS: To designate one or more charities or federated group that appear on the list provided, fill in the charity or federation code(s) and dollar amounts(s) below..

USE CODES FROM 2005 BROCHURE ONLY

FOUR DIGIT CHARITY CODE	ANNUAL AMOUNT
	$
	$
	$
	$
	$

☐ VOLUNTEER: I would like to be a workplace CFC volunteer next year. Please contact me for more information at:

RECOGNITION OPTIONS

Check ONE Box: If both boxes are checked, no information will be released.

☐ DO NOT release any information to charities.

☐ Release my name and the (optional) home address and/or home email contact information I provide below to all the charities I designated. If I do not provide home contact information, only my name will be released._____

CFC Organizations do not provide goods or services in whole or partial consideration for any contributions made to the organizations via this pledge card.

PAYROLL DEDUCTION AUTHORIZATION

I hereby authorize any agency of the United States Government by which I may be employed during 2006 to deduct the amount(s) shown above from my pay each pay period during the calendar year 2006 starting with the first pay period that begins in January and ending with the last pay period that begins in December, and to pay the amounts so deducted to the Combined Federal Campaign shown above. I understand that this authorization may be revoked by me in writing at any time before it expires.

Signature _____ Date _____

OPM Form 1654 June 2005

Pledge Card

Training guide page 22

7500 ☐ Super Eagle Giver ☐ Eagle Giver

2005 Hawaii-Pacific Area
Combined Federal Campaign
P.O. Box 1096 Honolulu, Hawaii 96808

OPM CFC Control number 0225
ATTENTION PAYROLL OFFICES:
This number identifies the local CFC
DO NOT enter into Federal payroll systems

NAME (LAST)	(FIRST)	(MIDDLE INITIAL)	UNIT/DIVISION AND PAYROLL OFFICE (optional)
1 Thomas	Paul	J	

MILITARY UNIT/FEDERAL DEPT./AGENCY	DUTY PHONE	PAY GRADE (optional)	SOCIAL SECURITY NUMBER
USA, Schofield, Co. A,	546-2213	E5	555-12-1212

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	$25.00 X 12 MONTHS =	$300.00
X	$15.00 X 12 MONTHS =	$180.00
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PRINT NEATLY
KEYPERSON ENVELOPE NUMBER
3001
MAKE CHECK PAYABLE TO:
COMBINED FEDERAL CAMPAIGN

✓BOX	CIVILIAN	TOTAL
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	$ 7.00 X 26 PAY PERIODS =	$182.00
	CASH OR CHECK	$

PAYROLL DEDUCTION

FOUR DIGIT CHARITY CODE	ANNUAL AMOUNT
	$
	$
	$
	$
	$

☐ VOLUNTEER: I would like to be a workplace CFC volunteer next year. Please contact me for more informati

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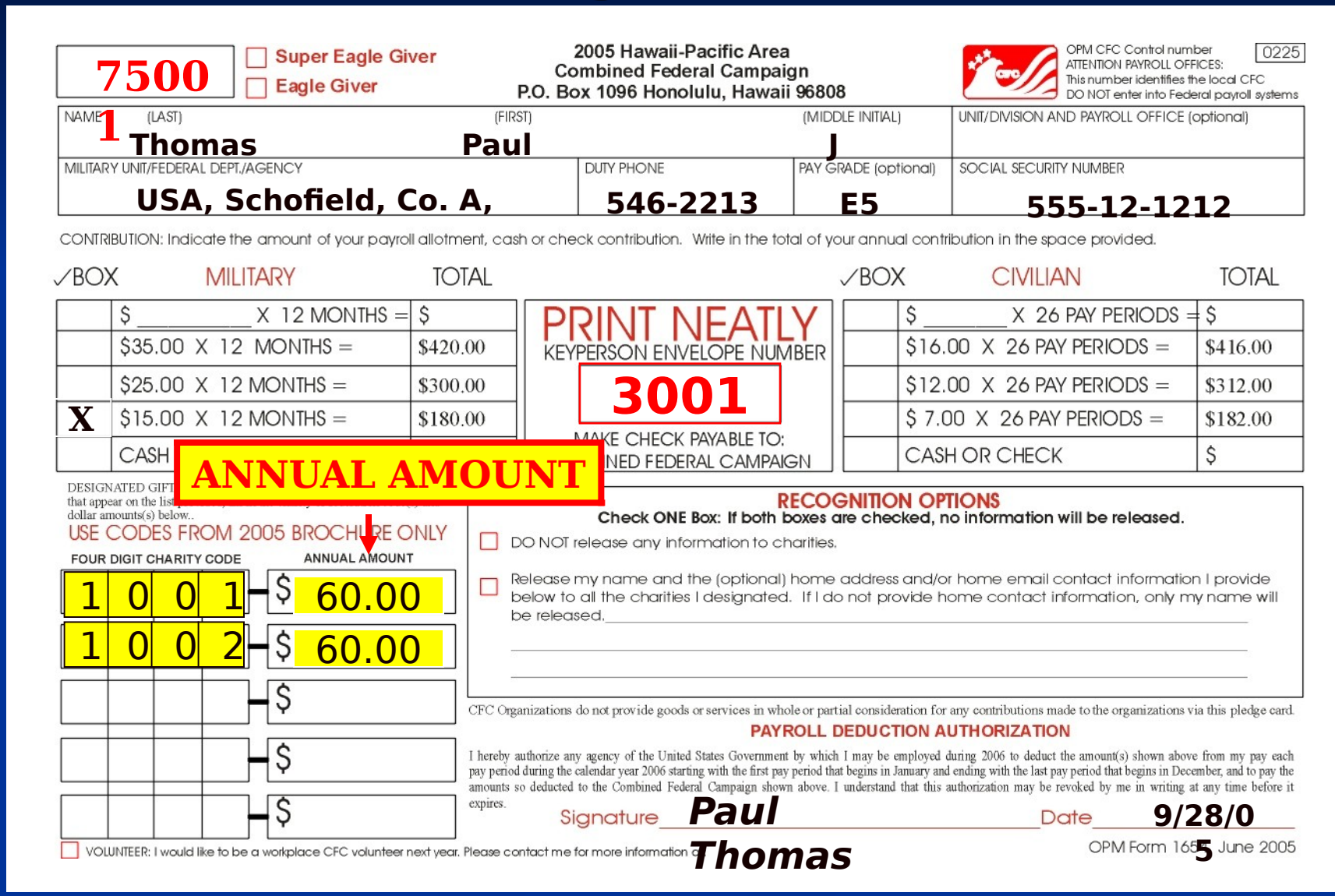
Signature *Paul Thomas* Date 9/28/05

OPM 05

Pledge Card

Training guide page 22



7500

☐ Super Eagle Giver
☐ Eagle Giver

2005 Hawaii-Pacific Area
Combined Federal Campaign
P.O. Box 1096 Honolulu, Hawaii 96808

OPM CFC Control number 0225
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	CASH	

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	$ 7.00 X 26 PAY PERIODS =	$182.00
	CASH OR CHECK	$

PRINT NEATLY
KEYPERSON ENVELOPE NUMBER
3001
MAKE CHECK PAYABLE TO:
NED FEDERAL CAMPAIGN

ANNUAL AMOUNT

DESIGNATED GIFT
that appear on the lis
dollar amounts(s) below..

USE CODES FROM 2005 BROCHURE ONLY

FOUR DIGIT CHARITY CODE	ANNUAL AMOUNT
1001	$ 60.00
1002	$ 60.00
	$
	$
	$

RECOGNITION OPTIONS
Check ONE Box: If both boxes are checked, no information will be released.

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Signature Paul Thomas Date 9/28/05

☐ VOLUNTEER: I would like to be a workplace CFC volunteer next year. Please contact me for more information

OPM Form 165 June 2005

Pledge Card

Training guide page 22

7500 ☐ Super Eagle Giver ☐ Eagle Giver

2005 Hawaii-Pacific Area
Combined Federal Campaign
P.O. Box 1096 Honolulu, Hawaii 96808

OPM CFC Control number 0225
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DO NOT enter into Federal payroll systems

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1 Thomas	Paul	J	

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USA, Schofield, Co. A,	546-2213	E5	555-12-1212

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USE CODES FROM 2005 BROCHURE ONLY

FOUR DIGIT CHARITY CODE	ANNUAL AMOUNT
1001	$ 60.00
1002	$ 60.00
	$
	$
	$

☐ VOLUNTEER: I would like to be a workplace CFC volunteer next year. Please contact me for more information

RECOMMENDATION OPTIONS

Check ONE Box: If both boxes are checked, no information will be released.

☐ DO NOT release any information to charities.

x Release my name and the (optional) home address and/or home email contact information I provide below to all the charities I designated. If I do not provide home contact information, only my name will be released.

pthomas@email.com

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Signature Paul Thomas Date 9/28/05

OPM Form 1654 June 2005

Pledge Card

Training guide page 22

- Keyperson fills in keyperson envelope number
- Keyperson fills in donor's name
- Pledge card checklist
  - Civilian vs. military
  - Designated charities (annual amount)
  - SSN and signature for payroll deduction
  - All checks payable to CFC
  - Figures computed correctly
    - 100/12 = 8.33 (multiplied out - comes to 99.96)
    - System will reject it!
  - Pledge card completely filled out and legible
  - Turn number 1 copy into payroll office

Pledge Card

Training guide page 22

- **Keyperson reminders**
  - **Confidential donation**
    - **Donor completes pledge card**
    - **Write confidential on a white mailing envelope**
    - **Write pledge card number on the white mailing envelope**
    - **Place pledge card inside white mailing envelope and seal it**
    - **Opened at CFC headquarters**
    - **Annotate confidential on keyperson report and top left corner of keyperson envelope**
  - **More than five charities**
    - **Use consecutive cards**
    - **Only make one pledge on first card**
    - **Use second card for designations and name only**

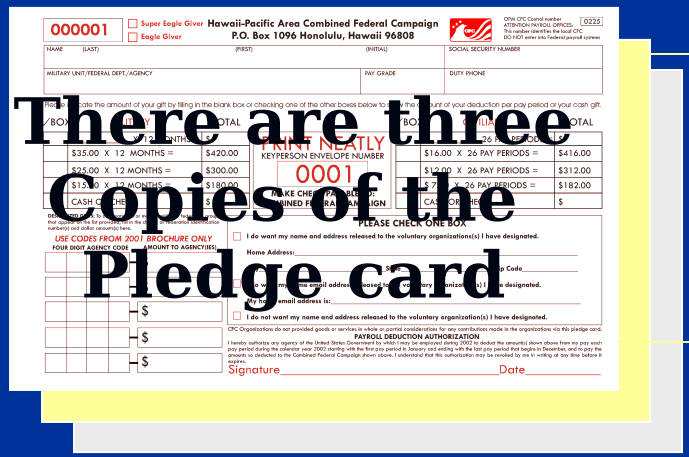
Pledge Card

- Keyperson reminders
  - Name release Authorization Box
    - Must be marked and completed if donor wants their name released to the charities they designated
    - Names will be forwarded to charities in February
  - 250+ cash/check form
    - IRS requirement for taxes
    - Will be mailed in January
  - Lost pledge card form
    - Fill form out if any pledge cards are missing

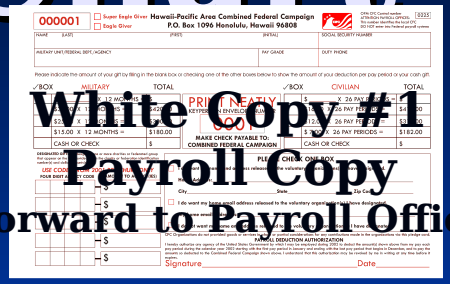
Training guide page 22

Pledge Card Flow Chart

There are three Copies of the Pledge card

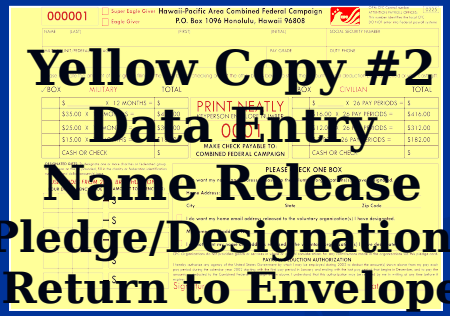

000001
Super Eagle Giver
Eagle Giver
Hawaii-Pacific Area Combined Federal Campaign
P.O. Box 1096 Honolulu, Hawaii 96808
0225
NAME (LAST) (FIRST) (INITIAL)
SOCIAL SECURITY NUMBER
MILITARY UNIT/FEDERAL DEPT./AGENCY
PAY GRADE
DUTY PHONE
PRINT NEATLY
KEYPERSON ENVELOPE NUMBER
0001
MAKE CHECK PAYABLE TO COMBINED FEDERAL CAMPAIGN
PLEASE CHECK ONE BOX
USE CODES FROM 2001 BROCHURE ONLY
FOUR DIGIT AGENCY CODE
AMOUNT TO AGENCY(IES)
I do want my name and address released to the voluntary organizations(s) I have designated.
I do not want my name and address released to the voluntary organization(s) I have designated.
PAYROLL DEDUCTION AUTHORIZATION
Signature
Date

White Copy #1
Payroll Copy
Forward to Payroll Office

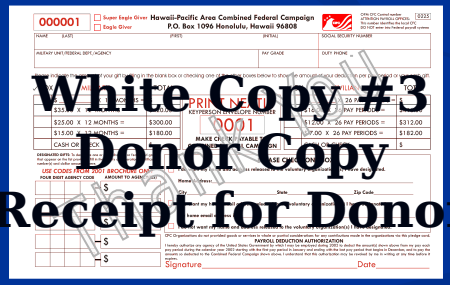


Federal Payroll Offices
Issue checks to CFC

Yellow Copy #2
Data Entry
Name Release
Pledge/Designations
Return to Envelope



White Copy #3
Donor Copy
Receipt for Donor



CFC Distributes checks to charities

Training guide page 22

Donor Brochure

- **Brochure sections**
  - **Index**
  - **CFC Information**
  - **Local**
  - **National**
  - **International**
  - **Frequently asked questions**
  - **Suggested giving guide**

Donor Brochure

- Things to be aware of
  - Charity Code
  - Charity Name
  - Website address
  - Phone number
  - 25 word description
  - EIN # (employer identification number)
  - Charities overhead %(*)
    - * Denotes that overhead is over 25%

Campaign Impact

- Who uses these charities?
  - Think of some of the charities you and your family use or have used
- CFC video
  - Shown at donor educational briefings
- Guest speakers
  - Invited to donor educational briefings

Frequently Asked Questions

- How did the charities get in there?
  - Criteria in the federal register (regulations)
    - IRS determination of non-profit status (501C3)
    - Independent audit (Revenues more than 100k)
    - Administrative cost less than 25%*
    - Local charities must be local
    - Not over 80% government funded
  - All applications are screened by federal employees
    - OPM - Office of Personnel Management
      - National and International charities
    - FEB – Federal Executive Board
      - Local charities

Frequently Asked Questions

- **Why designate?**
  - **Support charities of your choice**
  - **Undesignated goes to all charities that receive designations**
  - **There are charities that you may not support in the brochure**
  - **Make sure you designate your donation!**

Frequently Asked Questions

- **Did my money go to the charity I designated?**
  - **Data entries are verified**
  - **Database will not accept invalid codes**
  - **We will release your name to the charity provided you fill out the name release authorization box**
  - **The CFC is audited annually**

Frequently Asked Questions

- **Why give through CFC?**
  - **Charities can plan better (notified of amount)**
  - **Keeps fundraising cost down**
  - **The ease of payroll deduction**
  - **Payroll deduction does not start until January**
  - **Over 1800 charities to choose from**
  - **We all use these charities and will need them in the future**

Recognition Items

Eagle Recognition

Super Eagle Recogni

Discussion

- Questions
  - If you have one, someone else may have the same one. This is the time to ask!

Thank You